

May 10, 2004

Dear Bidder:

Macomb County Purchasing is requesting sealed bids for the procurement of an Imaging and Document Management System for the Macomb County Friend of the Court.

Sealed bids will be accepted by the Macomb County Purchasing Office, 13th Floor, County Building, 10 North Main Street, Mt. Clemens, Michigan 48043, until, 1:00 p.m., Thursday, June 10, 2004, at which time they are to be opened and publicly read aloud.

One (1) original and ten (10) copies of the response to the RFP must be furnished on or before the deadline. All proposals must be submitted on the forms furnished by the Purchasing Office. Bids are to be sealed and marked: SEALED BID ITEM 16 - 04.

All proposals submitted shall remain firm for a period of one hundred eighty (180) days after official opening of bids.

RIGHT TO REJECT: The County of Macomb reserves the right to reject any or all bids in whole or in part and to waive any informalities therein, or accept any bid it may deem in the best interest of the County.

Very truly yours,

Polly A. Helzer  
Purchasing Manager

PAH:jrm

**County of Macomb**

**Imaging and Document Management**

**Request for Proposal**



**May, 2004**

**Bid Item 16-04**



# **County of Macomb FRIEND OF THE COURT Request for Proposal**

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## **SECTION 1 - OVERVIEW**

Macomb County is located in southeastern Michigan and ranks third in population in the State, with a 2000 census total near 800,000 people, representing a 10% population growth over the 1990 census. Several larger communities populate its southern and central regions while smaller rural and agricultural communities occupy its northern region. The county encompasses 482 square miles and is bordered to the east by Lake St. Clair, a large body of water that is part of the area's Great Lakes waterway.

The Friend of the Court office is a component of the Family Division of the Macomb County Circuit Court. The department was created in 1919 by Michigan law and is charged with the following duties:

- ◆ to conduct investigations and make reports and recommendations to the Court regarding custody, parenting time, child support and spousal support
- ◆ to offer mediation as an optional way of settling custody or parenting time disputes
- ◆ to process and record all support payments as ordered by the Court
- ◆ to provide enforcement services on all custody, parenting time and support orders entered by the court.

The Friend of the Court is a 125-employee department that deals with the needs of families from the time of separation until the children reach the age of 18 or high school graduation up to 19 ½ years of age. The department's involvement may continue for up to 10 years beyond that time to allow for enforcement of support arrearage. Currently, Macomb County has approximately 34,000 active cases and 9,100 inactive cases with the average case containing 325 pages of documents.

The Friend of the Court department receives an average of 20,000 pieces of mail each month including some 1,500 pieces of returned mail.

The County of Macomb in Michigan is seeking proposals from qualified system Integrators to provide imaging, document management and workflow hardware, software, implementation, integration and supporting services to the Macomb County Friend of the Court. The goal is to implement a document management system which will allow for the capturing, indexing, storage and retrieval of all pertinent case documents received through FOC as well as the utilization of workflow technology to control document flow.

### ***CURRENT ENVIRONMENT***

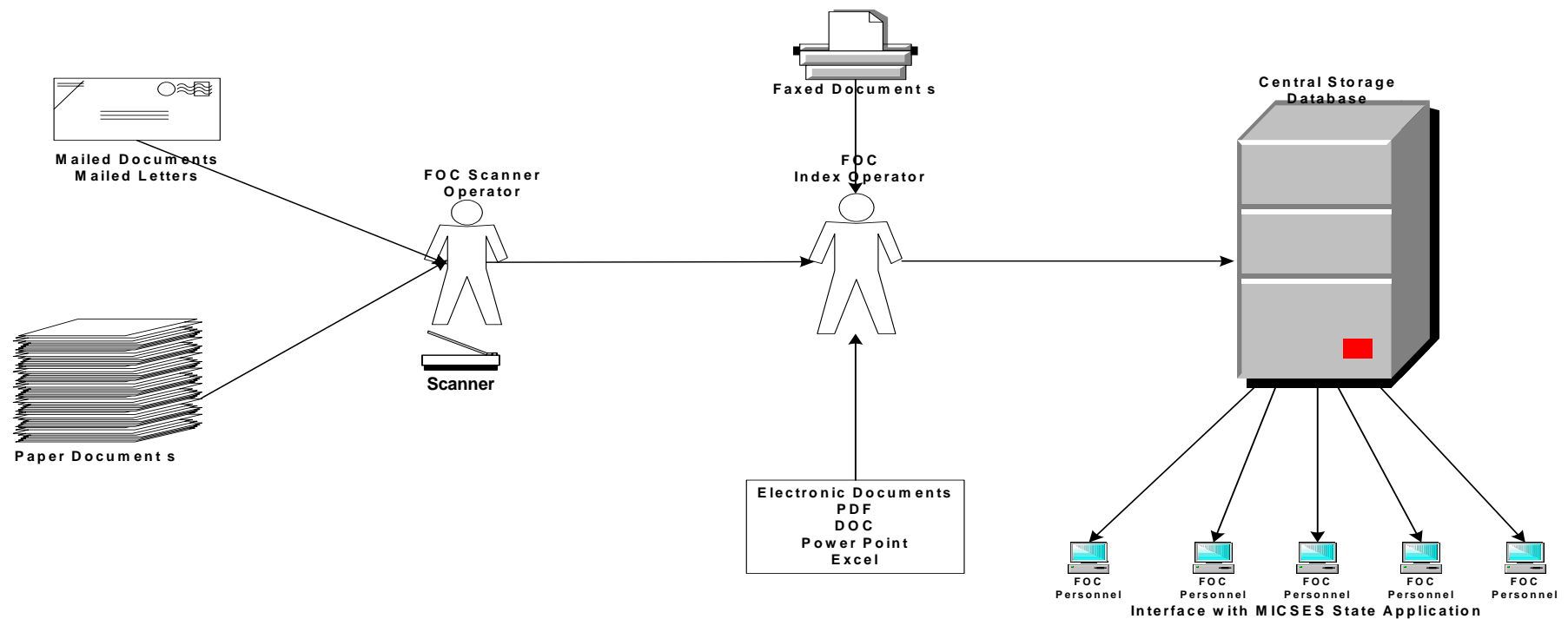
The Friend of the Court area currently utilizes the Michigan Child Support and Enforcement System (MiCSES) to track payments and case histories. MiCSES utilize T1 line communicates with CBDS network in Lansing, Michigan. Macomb County uses



Pathworks to emulate the TI CBDS network. The FOC user desktop uses Internet Explorer with a plug-in known as Jinitiator to deliver the MiCSES screens. The application server functions as web server to construct the screens that the user sees and communicates with the user to allow inquiry and update interfacing within the application logic. The application server also maintains a connection to the Oracle 9i database server to store client information.



### Friend of the Court Document Management Process Flow





## SECTION 2 - INSTRUCTIONS

### 2.1 ***Definitions.***

*Bidder* - refers to all respondents to this RFP.

*Contractor* - refers to the successful bidder who is awarded the contract and contracts with the County of Macomb to provide the work described in this document

### 2.2 ***Proposal Submission.*** Please submit responses to the Request for Proposal (RFP) to:

**Macomb County Purchasing  
Attn: Ms. Polly Helzer  
10 North Main Street, 13<sup>th</sup> Floor  
Mt. Clemens, MI 48043  
RE: 16-04 Sealed Proposal Item  
Solicitation Deadline: 1:00 p.m. Thursday, June 10, 2004**

### 2.3 **Responses to the RFP must arrive at the above listed address no later than 1:00 PM on the date specified above to be considered for award.**

2.4 One (1) original and ten (10) copies of the response to the RFP must be furnished on or before the deadline. Responses will be retained as property of the procuring activity.

2.5 Proposals must be typed or printed in ink. All corrections made by the bidder prior to the opening must be initialed and dated by the bidder. No changes or corrections will be allowed after the RFP responses are opened.

2.6 The responses to this RFP must contain an original signature of an authorized representative of the responding firm.

2.7 The County of Macomb is not liable for any costs incurred by any respondent prior to the issuance of an executed contract. Additional charges and costs submitted at any point after Proposal award is unacceptable. Bidder will retain all risks in pricing, including mathematical calculations and judgement.

2.8 ***Bidder Meeting.*** A bidders meeting will be held at 1:30 p.m. on May 20, 2004 in the Board of Commissioners Conference room, 1 South Main Street, 9<sup>th</sup> floor, Mt. Clemens, Mi. Attendance is not mandatory. This will be an opportunity to submit questions, however, answers will be mailed to all bidders in attendance.



- 2.9 ***Bid Opening.*** Responses to the RFP received prior to the time of opening will be secured unopened. RFP responses will be opened by the County of Macomb office at the specified time and no Proposals received thereafter will be considered. Responses received after the scheduled receipt time will be marked "TOO LATE" and will be returned unopened to the respondent.
- 2.10 The County of Macomb will not be responsible for the premature opening of an RFP response not properly addressed as identified in paragraph 2.2 above on the outside of the envelope. Failure of a bidder to properly address an RFP response may classify the entire response as "non-responsive".
- 2.11 ***Final Award/Contract.*** This RFP and bidder's response will become part of the contract document. The intent of this RFP document is to include all items necessary for proper execution and completion of the work for configuring and installing the system.
- 2.12 ***Contract Award Basis.*** A contract will be awarded to the responsible bidder whose Proposal represents the combination of technical merit and cost most advantageous to the County of Macomb. Bidders are advised that the County of Macomb may make award to other than the low cost bidder. The County of Macomb reserves the right to determine which Proposal demonstrates the requisite competence and offers the greatest value.
- Bids will be analyzed with respect to, but not exclusively, the following criteria:
- Current availability of a packaged solution in productive use
  - Compliance with system requirements
  - Completeness of Bidder questionnaire
  - Product maturity, (i.e., stability, use, technology)
  - Product demonstrations
  - Organizational ability, (i.e., implementation support, post-implementation support, training, responsiveness)
  - Organizational experience with respect to the proposed system
  - Organizational structure, (i.e., local support, help desk, etc.)
  - Documentation
  - Cost, (i.e., purchase and installation, maintenance, support)
  - Compliance to bid response formats and completeness of response
  - Business position
  - Future strategies
- 2.13 The County of Macomb reserves the right to accept or reject any or all RFP's and to waive any irregularities in the best interest of the County of Macomb.





- 2.14 ***Alternate Proposals.*** All Proposals should address all information in the agreement outlined in this RFP. Any deviation or variation from the requested format must be presented under a separate cover and should be marked as an alternate Proposal. The use of alternate Proposals is at the discretion of the County of Macomb.
- 2.15 ***Questions.*** Questions concerning Request for Proposal interpretation should be directed in writing to the following person listed below. Bidder may fax or mail a written request with questions to:

**Bid Process Requirements**  
**Ms. Polly Helzer**  
**Macomb County Purchasing,**  
**13<sup>th</sup> Floor**  
**10 North Main Street**  
**Mt. Clemens, MI 48043**  
**Fax: (586) 469-6612**

**All questions must be submitted in writing, phone calls will not be accepted. All bidders will be provided a copy of the written response, including the question and the County's response.**

**Deadline for bidder questions is Monday, May 24, 2004.**

- 2.16 ***Response Format.*** Bidder's response must include the following information in the same order and format sequence:

*Cover letter* (optional)

Section 1. *Company information*, including

- Company background
- Local organization support
- Principal line of business
- Corporate strategic plan for future technical architecture and software development direction of the proposed solution, including but not limited to, timeframes for all known futures and necessary changes from current architecture needs
- A copy of your HIPAA Business Associate Agreement
- A copy of your most recently audited financial statements; if publicly traded, provide a copy of the form 10-Q for that quarter which ended your most recent fiscal year
- If applicable, provide a list of your vendor partners for this bid and include a brief description of their respective services and responsibilities in relation to this bid



Section 2. *Description of technical solution(s)*

*NOTE: All items specified in this section must be quoted and itemized in the Pricing Summary Worksheet and appropriate Pricing Worksheet Schedules (Attachment C)*

*Detailed List of Hardware*

Provide specifications for necessary hardware, including quantities and part numbers (if available). Hardware list must include all necessary components to facilitate:

- Clustering
- Failover
- Redundancy
- Replication for disaster recovery
- Backup and recovery
- Separate hardware platform for test environment
- Imaging and Document Management

*Detailed List of Software*

Provide specifications for necessary software, including licensing type, quantities and pricing structure. Software list must include all necessary components for:

- Application
- Operating System
- Database
- Report Writing tools
- Imaging and Document Management
- Backup and recovery
- System Management
- Miscellaneous system utilities

Section 3. *Completed Bidder questionnaire* (contained herein)

Section 4. *Completed system requirements checklist* (contained herein).

Section 5. *Implementation Plan*, including

- Project plan with timeline showing milestones and durations including estimates of the actual person days and elapsed time required for installation of your product
- Strategy for converting current production data and historical data
- Installation plan including options for installation of software
- Company resource allocation and responsibilities
- Company individual resource qualification and experience including training, certification and experience
- Subcontractor qualification and experience including training, certification and experience
- County MIS resource allocation and responsibilities



County Client department resource allocation and responsibilities

Section 6. *Pricing Summary Worksheet* – See Attachment C for required format

Section 7. *Minimum Requirements*

Specify minimum hardware requirements for workstations

Specify minimum operating system requirements for workstations

Specify minimum network cabling requirements (i.e. Cat5 cable with RJ45 network connectors, fiber with SC network connectors) including number of switch ports required based on bidders proposed server configuration including appropriate diagrams and wiring plans

Section 8. *Bidder References and Customer List*

At least three must be provided.

Must be similar in size/nature/function to the County of Macomb. Indicate how long reference has been using the product.

Provide a Customer list (separate from references) quantifying total customers by location and the versions of the total package in use, software, database, operating system, etc. currently implemented in a production environment.

Section 9. *Bidder Compliance Worksheet* - See Attachment D for required format

Section 10. *Summary of Recommendation*

Section 11. *Product brochures and literature*

Prior submissions do not satisfy this provision

All information requested in section 2.16 is required for the bid to be considered complete. These requirements will be evaluated by the County of Macomb.

2.17 ***Offer Period.*** All Proposals shall remain firm for a period of one hundred and eighty (180) days after official opening of the Proposals.

2.18 ***Publication.*** The successful bidder (contractor) shall not, without first obtaining the written consent of the Purchasing Manager, in any manner, advertise or publish the fact that bidder has contracted to furnish the County of Macomb with the material ordered.

2.19 ***Delivery and Acceptance.*** The Proposal must be F.O.B. destination, and include the cost of shipping, storing, and delivery of the supplies and/or



equipment. Also, the assembly and calibration of equipment must be included. The County of Macomb's acknowledgment of supplies or equipment delivery shall not constitute acceptance of the supplies or equipment. Acceptance takes place after the County of Macomb has inspected and determined the supplies or equipment meets all requirements. Any discrepancies or performance deficiencies noted at the time of acceptance shall be reviewed and the successful bidder shall produce a schedule for corrective action. Should the successful bidder fail to deliver in accordance with the promised delivery schedule or should an emergency supply situation prevail, the County of Macomb reserves the right to purchase an immediate supply from another source.

- 2.20 **Equipment Age.** All equipment must be new, (i.e., in current production and considered state-of-the-art at the time of installation). Remanufactured, refurbished, or reconditioned equipment shall not be provided unless specifically identified in the format proposal; however, is subject to rejection. Any deviation from the specifications must be described in detail or the item offered will be assumed to meet specifications.
- 2.21 **Performance Bond.** An approved performance bond or approved payment bond in the full amount (100%) of the contract is required so as to guarantee the County that the Contractor will faithfully perform the contract, and will make all payments for all labor and material costs or claims as furnished under the contract.



### SECTION 3 – TERMS AND CONDITIONS

- 3.1 ***Compliance with Laws.*** As applicable, Contractor specifically warrants and guarantees to the County of Macomb that all proposed products are in compliance with Federal, State and local laws, including but not limited to:

Federal Fair Trade Commission Act  
Federal Trade Commission Trade Practice Rules  
Fair Packaging and Labeling Act  
Federal Food, Drug, and Cosmetic Act  
Consumer Product Safety Act of 1972  
Federal Insecticide, Fungicide, and Rodenticide Act  
Federal Hazardous Substances Act (including the former Federal Caustic Poison Act)  
Fair Labor Standards  
Wool Products Labeling Act  
Occupational Safety and Health Act of 1970  
Michigan Occupational Safety and Health Act of 1976  
Flammable Fabrics Act

- that contractor will comply with all applicable provisions of Executive Order 11246 and Executive Order 11375, as amended, which requirements are incorporated herein by reference: the Vietnam Era Veterans Readjustment Act of 1974, Executive Order 11701; the Rehabilitation Act of 1973, executive Order 11758; and the rules, regulations, and relevant orders of the Secretary of Labor.
  - that contractor does not maintain or provide for its employees any segregated facilities. Contractor agrees that a breach of this Section is a violation of the Equal Opportunity Clause.
  - that contractor does not discriminate on the basis of religion, race, creed, national origin, sex, age or handicap and will comply with all applicable Equal Opportunity requirements.
- 3.2 ***Product Return.*** Should it become necessary to return product(s) to the contracted bidder, the County of Macomb will not be assessed a restocking fee.
- 3.3 ***Product Substitution.*** If the bidder is unable to cure any defect in quality, quantity, or delivery, the County of Macomb may contract with a substitute supplier and the original successful bidder in default, agrees to credit the pricing difference.



- 3.4 ***Liability of Materials.*** The contractor shall assume complete responsibility for protecting its work and stored materials from theft, vandalism, and all other risks. Work damaged or materials stolen, whether paid for by the County of Macomb or not, shall be replaced by the contractor at no cost to the County of Macomb.
- 3.5 ***Acceptance.*** All product(s) will be received by the County of Macomb subject to its right of inspection and rejection. The County of Macomb shall be allowed a reasonable period of time to inspect and test the product(s). The acceptance of software products will be predicated on the completion of a fully integrated users' acceptance test. It is required that all software products pass the user acceptance testing cycle to be accepted by the county. The County of Macomb will notify the contractor of any non-conformance with the terms and conditions of this agreement. The County of Macomb may reject any product(s), which do not conform to the terms and conditions of this agreement. Product(s) so rejected may be returned to the contractor or held by County of Macomb at contractor's risk and expense. Upon rejection of the product(s) by the County of Macomb, contractor shall immediately refund all payments made to contractor by the County of Macomb under this Agreement.
- 3.6 ***Macomb County Employment Status.*** Contractor's employees, or subcontractor's, who are on site of the County of Macomb premises are not Macomb County employees, and are not subject or benefited by the County of Macomb. The Contractor is responsible for all workers' compensation issues related to labor that Contractor provides to the County of Macomb.
- 3.7 ***Notice of Labor Disputes.*** Whenever an actual or potential labor dispute is delaying or threatens to delay the timely performance of this agreement, contractor shall immediately give notice thereof, including all relevant information with respect thereto, to the County of Macomb. Contractor shall insert the substance of this paragraph in any subcontract hereunder so that each such subcontract shall provide that, in the event its timely performance is delayed or threatened by delay by any actual or potential labor dispute, the subcontractor shall immediately notify contractor of all relevant information with respect to such dispute.
- 3.8 ***Advisement of Delays.*** The Contractor will advise the County of Macomb immediately of any problems or potential problems, which may affect the installation date. Contractor will not be liable for damages caused by delay in delivery due to acts of God of the public enemy, acts of the Federal and State government, fires, floods, quarantine restrictions, freight embargoes, or other causes not involving contractors fault or negligence and, unless the materials or supplies or work to be furnished under a subcontract are procurable in the open



market, delays of a subcontractor due to such causes provided that contractor notifies the County of Macomb within five (5) days after such delays become apparent. If the delays exceed thirty (30) days, the County of Macomb may terminate this Agreement and shall receive from the contractor, an immediate refund of all payments made to contractor by the County of Macomb under this agreement.

3.9 ***Licensure.*** The contractor shall secure at contractor's expense; all permits necessary to perform this work and shall pay fees required by the city, state, or federal governments. County of Macomb shall be held blameless if the contractor fails to do so.

3.10 ***Insurance Requirements for Independent Contractors.*** All independent contractors performing services for the County of Macomb will be required to maintain commercial insurance coverage, written by insurance companies acceptable to the County of Macomb, with a Best rating of at least A-. Such commercial insurance will have the following minimum limits of liability:

<i>Comprehensive General Liability</i> including	\$1,000,000 CSL
Products and completed operations	
Broad form property damage	
Premises operation	
Subcontractors	
Personal injury	

<i>Automobile Liability</i> including	\$1,000,000
Hired and leased vehicles	
Owned and non-owned automobile	
No fault	

<i>Workers Compensation Employer's Liability</i>	in accordance with state law
--------------------------------------------------	---------------------------------

<i>Blanket Crime/Employee Dishonesty</i>	not less than \$500,000
------------------------------------------	----------------------------

Bond must include a customer protection endorsement. Macomb County must provide the wording to be used in the bond for customer protection.

<i>Professional Liability/Errors &amp; Omissions</i>	\$1,000,000/\$2,000,000
------------------------------------------------------	-------------------------

Macomb County must be named an additional insured as respect to all lines except Worker's Compensation and Blanket Crime/Employee Dishonesty for the





contract in question with a thirty (30) day notice of cancellation or non-renewal. Certificates evidencing the minimum commercial insurance requirements must be mailed to Macomb County, c/o Risk Management – 8<sup>th</sup> floor, 1 South Main St., Mt. Clemens, MI 48043 no less than five working days before commencement of work.

In the event that claims in excess of the insured amounts provided are filed by reason of any operations under the services provided by the contractor, the amount of excess of such claims, or any portion thereof, may be withheld from payment due until such time as the contractor shall furnish such additional security covering such claims as may be determined by the County of Macomb.

- 3.11 ***Indemnity.*** Contractor will indemnify and hold harmless the County of Macomb from any and all claims, damages, losses expenses which may be suffered by Contractor arising out of or resulting from the assertion against Contractor of any claims, debts, or other obligations as a result of errors, omissions, or negligent acts associated with the execution of work related to this RFP.

Contractor will defend, indemnify and hold harmless the County of Macomb, its employees, customers, patients and users of installed materials from and against any claim, damage, or expense arising out of the purchase and/or use of materials purchased hereunder and/or arising out of Contractor's (or its subcontractor's) work or performance hereunder.

Contractor will defend, indemnify and hold harmless the County of Macomb from any claim against the assessment by any third party of any liquidated damages or proven actual damages arising out of the failure of Contractor to timely deliver the materials purchased hereunder.

Contractor shall defend, indemnify, and hold harmless the County of Macomb, its employees, customers and users of materials from and against any and all loss (including the cost of any materials lost by libel, condemnation or voluntary recall), damages or expenses arising out of any claim or finding by the United States of America or any state or local government or any agency of instrumentality thereof that the materials are not as herein guaranteed or warranted.

- 3.12 ***Governmental Immunity.*** Contractor agrees nothing in this Agreement shall be construed as waiving any and all governmental immunity provided to the County of Macomb under the Governmental Claims Act or by a court of law.

- 3.13 ***Warranty.*** Contractor warrants that all product(s):

- will comply with all applicable laws, rules and regulations





- will be free from defects in material and workmanship
- will conform to specifications, drawings, other descriptions, and samples accepted by the County of Macomb will be merchantable if ordered for a stated purpose, will be fit for such purpose

Contractor also warrants that, to the extent such product(s) are not manufactured pursuant to detailed designs furnished by the County of Macomb, they will be free from defects in design. Such warranties, including warranties prescribed by law, shall run to the County of Macomb, its customers and patients, and to end users of the product(s) for a period of one (1) year after acceptance by the County of Macomb or such longer period as may be prescribed by law or additional agreement.

- 3.14 ***Performance Warranty.*** Contractor warrants that services will be performed in a timely and professional manner by qualified professional personnel; and that the services shall conform to the standards generally observed in the industry for similar services. Contractor warrants that the contractor's performance of the services shall be in compliance with all applicable laws, rules and regulations.
- 3.15 ***Price Warranty.*** Contractor in the response warrants that the prices charged to the County of Macomb as indicated are no higher than prices charged on orders placed by others for similar quantities on similar conditions subsequent to the last general announced price change. In the event contractor breaches this warranty, the prices of the product(s) shall be reduced accordingly and retroactively to date of such breach.
- 3.16 ***Intellectual Property Warranty.*** Contractor warrants that it is the owner of the software, or is licensed to sell the software, and that it has the legal right to grant License to the County of Macomb for the use thereof according to the terms of this Agreement.
- 3.17 ***Intellectual Property Indemnity.***  
Contractor, at its own expense, shall (i) indemnify and defend, or at its option settle any claim, suit, or proceeding brought against County of Macomb by a third party alleging that any portion of the software infringes any United States patent, copyright, trade secret or other proprietary right of such third party (an "Infringement Claim"), and (ii) pay any reasonable costs and expenses incurred in defending or settling an Infringement Claim under this Agreement, or pay any settlement made by Contractor on such Infringement Claim.

If all or any material part of the software is, or in the opinion of the County of Macomb may become, the subject of a valid Infringement Claim, the Contractor shall at its expense promptly, either (i) replace the software with a compatible,



functionally equivalent, non infringing software product, (ii) modify the software or take action so that the software becomes non infringing, or (iii) procure the right of the County of Macomb to continue using the software, all without any additional cost to the County of Macomb.

The Contractor's obligations under subsections (1) and (2) above are expressly conditioned upon and subject to (i) the Contractor having sole control of the defense and/or settlement of such Infringement Claim, (ii) the County of Macomb notifying the Contractor in writing of such Infringement Claim as soon as reasonably practicable and giving the Contractor authority to proceed as set forth in clause (I) above, and (iii) the County of Macomb at the Contractor's request, giving the Contractor all information known to the County of Macomb relating to such Infringement Claim and otherwise reasonably cooperating with Contractor in the defense and/or settlement of such Infringement Claim. The Contractor agrees to reimburse the County of Macomb for reasonable costs and expenses incurred by the County of Macomb in connection with providing such cooperation, against receipt of invoices therefore.

3.18 ***Contract Provision Enforceability.*** All warranties shall be construed as conditions as well as warranties. No waiver of a breach or of any provision of this agreement shall constitute a waiver of any other breach or provision. No modification, or change in, or departure from, or waiver of the provisions of this agreement shall be valid or binding unless approved by the County of Macomb in writing. The invalidity or non-enforceability of any particular provision of this agreement shall be construed in all respects as if such invalid or unenforceable provision was omitted.

3.19 ***Termination.*** The County of Macomb may cancel this agreement, in whole or in part, without liability to the County of Macomb, if deliverables are not made at the time and in the quantities specified, or in the event of a breach or failure of any of the other terms or conditions hereof.

The County of Macomb may terminate this agreement in whole or in part, at any time for its convenience, by notice to contractor in writing. On receipt by contractor of such notice, contractor shall, and to the extent specified therein, stop work, and the placement of subcontracts hereunder terminate work under subcontracts outstanding hereunder, and take any necessary action to protect property in contractor's possession in which the County of Macomb has or may acquire an interest. Any termination claim must be submitted to the County of Macomb within sixty (60) days after the effective date of termination.



Any cancellation or termination by County of Macomb whether for default or otherwise, shall be without prejudice to any claims for damages or other rights of the County of Macomb whether for default or otherwise.

In the event this agreement is cancelled or terminated or the product(s) purchased are rejected by the County of Macomb, contractor shall immediately refund to the County of Macomb all amounts which have been paid to the contractor.

The County of Macomb shall have the right to audit all elements of any termination claim and contractor shall make available to the County of Macomb on request all books, records, and papers relating thereto.

3.20 **Assignment.** Neither party may assign this agreement or any interest herein, including any performance or any amount due or may become due, without prior written consent from the other party. Consent shall not be unreasonably withheld.

3.21 **Trademarks.** The County of Macomb warrants that all of the trademarks the County of Macomb requests contractor to affix to the product(s) purchased are those owned by the County of Macomb and it is understood contractor shall not acquire or claim any rights, title, or interest therein, or use any of such trademarks on any product(s) produced for itself or any one other than the County of Macomb.

3.22 **Escrow of Software Source Code.** Contractor shall provide a copy of the software source code to the County of Macomb for the purpose of insurance to the County should contractor cease business operations. In the alternative, contractor shall place source code in escrow with a licensed escrow agent.

3.23 **Payment Terms.** The tentative payment terms are as follows:

Contract signing	20%
Delivery of Project Work Plan	10%
Delivery of software	25%
Demonstration of Live System	20%
Documentation and Acceptance	25%

3.24 **Taxes.** Macomb County is a Michigan Municipal Corporation and as such is exempt from Federal Excise and Michigan Sales Taxes.

3.25 **Controlling Laws.** This agreement and the performance of the parties hereunder shall be controlled and governed by the laws of the State of Michigan.



## **SECTION 4 – BIDDER QUESTIONNAIRE**

1. Provide information relating to an active user's group for your proposed system. Include national and local chapters, fees, individual contacts and meeting schedules.
2. Describe your company's philosophy regarding the training and retention of qualified company staff to support your system.
3. Describe the types of licenses you offer (e.g., corporate, site, server, number of users). Please specify the terms and conditions for licensing, and what the fee basis is (e.g., machine size, number of users, etc.), as well as, how it is appropriated (e.g., concurrent, named used, per seat, per server, etc.).
4. Describe the methods used to ensure database integrity.
5. Describe your methodology for the following migration scenarios:
  - between hardware platforms
  - between database management systems
  - between operating systems
8. Describe the methods used to ensure optimal database sizing.
9. If the county chose to scan and index backfile records, would you provide this service?
  - What would the per page cost be for the scanning and indexing of these documents?
  - How would you ensure that the indexes of the images created are in sync with the corresponding application indexes?
  - Due to Federal regulations, backfile conversion must be conducted at the County site. How would you propose to accomplish this?
  - If you do not provide this service as a company, is there a third-party vendor with whom you would partner or recommend for this project?
    - What would the per page cost be for the scanning and indexing of these documents?
    - How are software issues handled under such a third-party configuration?



## **SECTION 5 – TECHNICAL REQUIREMENTS**

Review the system requirements and respond as to their availability within the proposed system.

- 1.0 System Architecture and Methodology
- 2.0 Application Architecture
- 3.0 System Capacity
- 4.0 Database Requirements
- 5.0 Platform Configuration and Interoperability
- 6.0 Network Configuration and Interoperability
- 7.0 Business Continuity/Backup/Audit/Data Archival
- 8.0 Security
- 9.0 S/W Release Management
- 10.0 Ongoing Support
- 11.0 Testing/Quality Assurance
- 12.0 Documentation
- 13.0 Technical Training



Responses should be entered under the **Reply** column as stated below, and corresponding narratives as required in the Comments column. Applicable ratings to be used in the reply column are

- 3** The requirement is available as a standard feature.
- 2** The requirement is available through modification to the system. Cost of customization must be indicated, as well as, any **additional costs** to the County of Macomb in the Comments column and the Pricing Summary Worksheet as appropriate. If all costs for customization are not provided the response will be viewed as the requirement is not available.
- 1** The requirement currently is not available but is identified as a system enhancement. Indicate proposed availability date and any additional software/hardware modifications and associated costs required to implement the release. If availability date and all costs associated with this enhancement and additional customization are not provided the response will be viewed as the requirement is not available.
- 0** The requirement is not available.
- N/A** The requirement is not applicable.

***Deviation from the prescribed rating format established above will result in a 0 (zero) rating being assigned to the requirement.***



Number	Requirement	Reply	Comment
<b>1.0</b>	<b><i>System Architecture and Methodology</i></b>		
1.1	Solution has web based architecture.		
1.1.1	If not, describe your solution's architecture.		
1.1.2	If so, describe/illustrate its architecture.		
1.1.2.1	Describe in detail solution Architecture with regards to Load Balancing utilizing best practices.		
1.1.2.2	Describe in detail solution Architecture with regards to Clustering utilizing best practices.		
1.1.2.3	Describe in detail solution Architecture with regards to database replication.		
1.1.2.4	Describe in detail solution Architecture with regards to fail-over.		
1.2	Solution can operate on Windows 2000 operating system.		
1.2.1	If not, describe the operating system(s) on which your solution operates.		
1.3	Solution can operate on HP Unix operating system.		
1.3.1	If not, describe the operating system(s) on which your solution operates		
1.4	Solution interfaces with GroupWise 6.5 e-mail system.		
1.4.1	If not, describe the e-mail system(s) with which your solution interfaces.		
1.5	System architecture has vertical scalability, (i.e. add additional servers, processors, memory and hard drives).		
1.6	System architecture has horizontal scalability i.e. add additional processors.		
1.7	The system has power supply redundancy.		



Number	Requirement	Reply	Comment
1.8	The system has network interface card redundancy.		
1.9	The system has Raid 1+0 Fault tolerance.		
1.10	The system has redundant fiber channels to disk array.		

<b>2.0</b>	<b><i>Application Architecture</i></b>		
2.1	Industry standard and/or specific tools were used to develop the application.		
2.1.1	If so, list the tools used, version level and provide a brief description.		
2.2	Application is designed in a modular fashion. That is, one system module can be acquired initially, and then another added later.		
2.2.1	If so, list the modules that must be bought as base, and the modules that can be added at a later date – if sequencing is required please provide that information as well.		
2.3	Current, future, and historical data can be viewed and updated online from the same application interface.		
2.3.1	If so, please describe how this is accomplished		
2.4	Application has extensive data search and sorting capabilities.		
2.4.1	If so, please describe the search and sort options.		
2.5	Application has validation for data input (field masks, numeric checks, date ranges, etc.).		
2.5.1	Application has extensive error handling routines and/or troubleshooting procedures.		
2.6	Application features Online help functionality:		
2.6.1	Available at the field level.		
2.6.2	Available at the screen level.		
2.6.3	User modifies and maintains help content based on user profile.		





2.6.4	Help is context sensitive.		
2.7	Application contains a fully documented API, which is open and comprehensive.		
2.7.1	If so, please describe this functionality.		
2.8	Application functionality provides for all system control parameters to be maintained by the client in the application via a GUI. (For example, should not have to rely on predefined script to reset a data value; instead, a screen should be available for this type of editing).		
2.9	User interface is menu-driven with direct screen-to-screen access.		
2.9.1	Application allows users to modify/customize menus.		
2.9.2	Menus display only the functions a user is allowed to perform.		
2.10	Solution allows the client to change fields on each screen from optional to required, based on security privileges.		
2.10.1	If so, describe at what level the security is set to allow for this level of editing (i.e., application or database).		
2.11	Solution allows the user to define which functions can be performed online or offline based on security privileges.		
2.12	Solution contains a "drill down" feature that enables a user to begin with a summary-level screen and can execute a drill down inquiry on more detailed transactions by selecting fields on the screen.		
2.13	Solution provides capability to establish user-defined navigation (i.e., hot keys or bypass screens not used by the user).		
2.14	All information stored in the system is viewable online with the option available for the user to execute a print screen or send the data to a report writer.		
2.15	Secured, remote inquiry access to a copy of the systems data files, using internet connection is available.		



2.16	Software developed under object-oriented methodology.		
2.16.1	If yes, provide samples of class and object models.		
2.17	Solution utilizes strategy that will allow components of solution to be re-used effectively.		
2.17.1	Proposed solution uses/inherits third-party libraries or classes.		
2.17.1.1	If so, describe.		
2.17.2	Proposed solution supports business object classes.		
2.17.2.1	If so, describe.		
2.18	Solution features data export capability.		
2.18.1	If so, describe file formats available (i.e., ASCII, XML, etc.).		
2.19	The proposed solution keeps new or modified tables separate from "core" production tables and accessible via foreign keys.		
2.19.1	If yes, describe.		
2.20	Offline processing with no active users is required.		
2.20.1	If yes, describe what requirements exist.		
2.21	Solution features export capabilities to any item in the database.		
2.21.1	Microsoft Word.		
2.21.2	Microsoft Excel.		
2.21.3	Other, (specify).		
2.22	Solution supports event-based, user-definable, multi-level workflow.		
2.23	Solution utilizes Internet Explorer 6.0 interface to the application with 128-bit encryption.		
2.23.1	If not, describe the web client on which your solution operates.		
2.24	Application can be accessed by Internet browser software alone.		
2.25	Solution requires client software to be installed on user PC's.		
2.25.1	If so, describe how the client software is pushed out to all PC's.		



Number	Requirement	Reply	Comment
<b>3.0</b>	<b><i>System Capacity</i></b>		
3.1	Capacity to support 150 concurrent active users utilizing full functionality of the application.		
3.2	Solution is configured to benefit OLAP (Online Analytical Processing).		
3.2.1	If so, describe configuration.		
3.3	Solution is configured to benefit OLTP (Online Transaction Processing).		
3.3.1	If so, describe configuration.		
3.4	Solution contains the ability to store and access in production at least 15 years of history.		
3.5	Solution is adequately sized to store and manage the 15 years of historical data referenced in requirement 3.4 and provide for seven (7) years of growth capacity.		
3.5.1	Provide capacity information for application record sizes.		
3.5.2	Provide capacity information for database record sizes.		
3.5.3	Provide expected growth capacity based on average number of images captured quarterly and annually as provided in Attachment A.		

<b>4.0</b>	<b><i>Database Requirements</i></b>		
4.1	Solution utilizes Oracle 9i database management systems.		
4.1.1	If so, please include entity relationship diagrams and other appropriate database design documentation with your response.		



4.1.2	If not, describe the database on which your solution operates		
4.2	Solution utilizes Microsoft SQL server 2000 database management systems.		
4.2.1	If so, please include entity relationship diagrams and other appropriate database design documentation with your response.		
4.2.2	If not, describe the database on which your solution operates		
4.3	Solution's database is normalized.		
4.3.1	If so, to what form is it normalized?		
4.4	Solution provides history archival capability for all data structures.		
4.5	User can select which structures are archived based on security privileges.		
4.6	Solution features capability to restore archived data back into the data structures.		
4.6.1	If so, describe this process		
4.7	Solution uses flat files (non-relational database).		
4.7.1	If so, how are they used?		
4.8	Database is ODBC compliant.		
4.8.1	What ODBC configuration does your solution use?		
4.9	Application enables administrators to add new data elements to the database.		
4.10	Application enables vendor to add new elements to the database.		
4.11	Database performance-tuning and optimization recommendations are provided as part of implementation.		
4.11.1	If yes, describe the recommendations.		
4.12	Data model and schemas are supplied with your solution.		
4.13	Data dictionary is supplied with your solution.		
4.14	Process model is supplied with your solution.		



Number	Requirement	Reply	Comment
4.15	Data replication scripts with supporting documentation will be provided as part of implementation.		
4.16	Vendor provides recommended migration process for movement from current environment to the proposed solution.		
4.16.1	Provide description of recommended migration process.		

<b>5.0</b>	<b><i>Desktop Configuration and Interoperability</i></b>		
5.1	Solution front-end application operates on a Microsoft Windows 2000 operating system.		
5.1.1	If not, indicate all operating systems under which your application executes.		
5.2	Solution fully integrates with Microsoft Office Suite 2000.		
5.2.1	If not, describe the office product(s) with which your solution is integrated.		
5.3	Response time for your solution is 3 seconds to display information to the end user.		
5.3.1	Provide benchmark transaction rate(s) for response time.		

<b>6.0</b>	<b><i>Network Configuration and Interoperability</i></b>		
6.1	Solution is designed for fast Ethernet or greater connectivity.		
6.1.1	If greater connectivity, specify.		

<b>7.0</b>	<b><i>Business Continuity/Backup/Audit/Data Archival</i></b>		
7.1	Disaster recovery solution for system provided by vendor.		
7.1.1	Onsite solution.		



Number	Requirement	Reply	Comment
7.1.2	Offsite solution.		
7.2	Bidder provides step by step instructional documentation of system implementation and configuration.		
7.3	Solution ensures that the database is protected through computer crashes (point-in-time database recovery).		
7.4	Bidder provides backup and recovery procedures for solution.		
7.4.1	Bidder provides backup and recovery procedures for database.		
7.4.1.1	Procedures will be tested, validated and documented.		
7.4.1.1.1	If so, describe this process.		
7.4.2	Bidder provides backup and recovery procedure for operating system		
7.4.2.1	Procedures will be tested, validated and documented.		
7.4.2.1.1	If so, describe this process.		
7.4.3	Bidder provides backup and recovery procedure for application.		
7.4.3.1	Procedure will be tested, validated and documented.		
7.4.3.1.1	If so, describe this process.		
7.5	Solution contains utilities required to perform file maintenance and data manipulation.		
7.6	Solution contains transaction logs and reports for changes, additions, and deletions as specified by system administrator.		
7.6.1	Transaction log reports can be run on demand.		
7.6.2	Describe logging options available for system, include features, frequency, performance utilization.		
7.7	Solution provides an audit trail.		
7.7.1	Audit trail is customizable by system administrator.		



Number	Requirement	Reply	Comment
7.7.2	The audit log will provide time, date, user name and change activity.		
7.7.3	Audit trail data can be archived on a separate schedule from other archive activity.		
7.7.4	System administrator is able to define the data elements of the audit trail to be archived.		
7.7.5	Solution includes capability to report and inquire on the audit trail files, current file and archived files.		
7.8	Solution contains a system error log that is viewable online.		
7.8.1	System provides notification in case of system errors.		
7.8.1.1	If yes, reports can be generated from system error log upon system administrator demand?		
7.9	Bidder has a detailed Service Level Agreement (SLA).		
7.9.1	If so, please include a generic copy of the agreement with associated pricing.		
7.9.3	The bidder has professional management services and dedicated staff for each application service that it provides.		
7.9.3.1	If so, include customer support response times.		
<b>8.0</b>	<b>Security</b>		
8.1	Auto log-off after some user-defined period of inactivity (e.g., 30 minutes).		
8.2	Security profile assigns add, edit, delete or inquiry rights based upon a unique user name and unique password, which meets complexity requirements (defined as a minimum 8 character password including both alpha and numeric characters, with alpha characters in both upper and lower case,) at the following levels:		



Number	Requirement	Reply	Comment
8.2.1	Functional group:		
8.2.1.1	System administrator defines which functions are contained in a functional group.		
8.2.1.2	Users can be assigned to several functional groups.		
8.2.1.3	System administrator is able to disable and enable specific functional groups.		
8.2.2	Screen:		
8.2.2.1	Users can be assigned inquiry or update access to specific screens within the application.		
8.2.2.2	Users can be assigned add/update or inquiry access at the field level.		
8.3	Solution supports Active Directory level security (e.g., Windows 2000 Authentication).		
8.4	Security is tied to the user-id.		
8.4.1	Stations can be designated as inquiry only based on user profile.		
8.4.2	Stations can be limited to specific functions.		
8.4.3	System security allows for usage of roaming profiles at County of Macomb discretion.		
8.5	Solution provides capability for system administrator to change user profiles while system remains online and accessible to users.		
8.5.1	Modifications to user security profiles take effect immediately upon next user log-in.		
8.5.2	Modifications to user security profiles can be effective dated.		
8.6	Solution prohibits user from access after a system administrator defined number of failed attempts to sign on to the system.		
8.7	Users are required to change from the system generic password upon initial login.		





Number	Requirement	Reply	Comment
8.8	System administrator is able to reset a user's password to the system generic password.		
8.9	The defined user profile is consistent across the environment (e.g., online access, report access, etc.).		
8.10	Access to published custom reports can be dependent upon the user's security profile.		
8.11	Solution has security templates that can be modeled.		
8.12	Solution utilizes record-locking methodology to be used at system administrator discretion.		
8.12.1	If so, describe the types utilized (i.e., row level, page level).		

<b>9.0</b>	<b><i>S/W Release Management</i></b>		
9.1	Software updates are available:		
9.1.1	Via Web download.		
9.1.2	Via Compact Disk.		
9.2	Bidder provides advanced notification of software update releases.		
9.2.1	Specify notification duration for fixes.		
9.2.2	Specify notification duration for release level changes.		
9.3	Solution releases are managed to keep current with industry progression of operating system(s).		
9.3.1	If so, define how your organization maintains software capability with industry progression of operating system.		
9.4	Solution releases are managed to keep current with industry progression of database versions.		
9.4.1	If so, define how your organization maintains software capability with industry progression of database versions.		



Number	Requirement	Reply	Comment
9.5	Version control software is used.		
9.5.1	Describe which products you use to manage this for full releases.		
9.5.2	Describe which products you use to manage this for fixes.		
9.6	Client community is solicited for possible enhancements and/or future releases.		
9.6.1	If so, how is this information collected and communicated?		
9.7	System enhancements are placed in test and migrated to production.		
9.7.1	Describe your process for migrating objects, programs and tables from test to production.		
9.8	System fixes are placed in test and migrated to production.		
9.8.1	Describe your process for migrating objects, programs and tables from test to production.		
9.9	Solution is capable of preventing client modification to generated code.		
9.9.1	If so, describe how.		

<b>10.0</b>	<b><i>Ongoing Support</i></b>		
10.1	Bidder provides a single-point toll-free hotline for problem resolution.		
10.1.1	Bidder provides unlimited support via toll-free line.		
10.1.2	Bidder will provide for a multi-level prioritization scheme that facilitates the recognition and resolution of critical problems.		
10.1.3	Critical problems will be resolved within 4 hours.		
10.1.4	All problems will be addressed within 24 hours.		

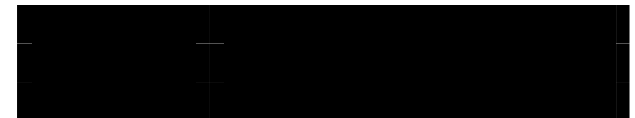


Number	Requirement	Reply	Comment
10.1.5	Bidder communicates the status of and actions taken on problems not resolved within the resolution window.		
10.1.6	Bidder provides for customer prioritized ranking of trouble calls.		
10.2	The Bidder's on-site staff is qualified in all aspects of their responsibilities including operating system, database, hardware and application.		
10.3	Bidder provides on-going maintenance agreements.		
10.3.1	If so, please describe the various levels of support available specifying coverage provided at each level.		
10.4	Skill sets are required by the User's MIS department for supporting your proposed solution.		
10.4.1	If so, describe the skill sets that are needed.		
10.5	Support agreement includes remote support of solution via VPN connection as defined by County of Macomb.		
10.6	Solution will require on-going support from technical staff.		
10.6.1	If so, describe the support needed including a recommendation for the number of technical resources that are needed to support your solution.		

<b>11.0</b>	<b>Testing/QA</b>		
11.1	Bidder utilizes quality assurance methodology and processes based on industry best practices.		
11.1.1	If so, describe the methodology and processes utilized.		



Number	Requirement	Reply	Comment
11.2	Bidder will demonstrate benchmark 3 seconds response time with database volume at minimum 80% of anticipated growth capacity over the next 7 years as indicated in Requirement 3.5.1 based on average number of images captured quarterly and annually as provided in Attachment A. For example, if the anticipated growth capacity is 20,000 records in the database in 7 years, bidder must demonstrate 3 seconds response time with 16,000 records in the database.		
11.3	Bidder will specify a configuration to establish a separate test environment independent of the production system and hardware.		
11.4	Third party automated testing products are used as part of implementation process.		
11.4.1	If so, specify products.		
11.5	Canned test scripts are supplied as part of implementation testing process.		
11.6	Bidder allows test customization based on customer installation.		
11.7	Testing methodology includes acceptance criteria.		
11.7.1	If so, describe process for development of acceptance criteria.		
11.7.2	If not, indicate method for ascertaining client acceptance.		
11.8	Bidder utilizes testing methodology.		
11.8.1	Provide bidder's definition of "lifecycle testing".		
11.8.2	Provide deliverables for unit, systems, integration, user acceptance and performance testing.		





Number	Requirement	Reply	Comment
<b>12.0</b>	<b>Documentation</b>		
12.1	Bidder provides documentation prior to making software update releases.		
12.1.1	If so, describe what documentation is provided for full releases.		
12.1.2	If so, describe what documentation is provided for enhancements.		
12.1.3	If so, describe what documentation is provided for fixes.		
12.2	Bidder will provide system and user documentation via:		
12.2.1	CD-ROM.		
12.2.2	Hardcopy.		
12.2.3	Internet download.		
<b>13.0</b>	<b>Technical Training</b>		
13.1	Bidder will provide a training plan that will describe in detail how technical and application support staff will be trained to use the system. The plan includes:		
13.1.1	A training strategy.		
13.1.1.1	Please provide a copy of your training strategy.		
13.1.2	Description of training environment including necessary hardware and peripherals.		
13.1.2.1	Please provide a copy of the description of the training environment.		
13.1.3	Training methods to be used.		
13.1.3.1	Please provide a description of the training methods to be used.		



13.1.4	Training location and schedule.		
13.4.1.1	Please provide the training location and proposed schedule.		
13.1.5	List of instructors with qualifications.		
13.1.5.1	Please provide the list of instructors with qualifications.		
13.2	Bidder will execute the training services identified in the plan.		
13.3	Bidder's proposal describes the training that will be provided to technical and application support staff. This will include:		
13.3.1	Curriculum.		
13.3.2	Training materials.		
13.3.3	Maximum number of students per class.		
13.3.4	Number of days required to cover course material.		
13.4	Bidder will provide comprehensive training for up to ten (10) technical staff. This will include:		
13.4.1	Setup and implementation.		
13.4.2	Day-to-day administration.		
13.4.3	Trouble shooting/problem resolution.		
13.4.4	Backup and recovery procedures.		
13.4.5	(Train the trainer) In-depth training for post-production technical support staff trainers. This will cover all aspects of the system's software functionality.		



## **SECTION 6 – FUNCTIONAL REQUIREMENTS**

Review the system requirements and respond as to their availability within the proposed system.

- 1.0 Corporate Strategy
- 2.0 Reporting Capabilities
- 3.0 End-User Training
- 4.0 Project Management
- 5.0 Application Requirements
- 6.0 Imaging Performance



Responses should be entered under the **Reply** column as stated below and corresponding narratives as required in the Comments column. Applicable ratings to be used in the reply column are:

- 3** The requirement is available as a standard feature.
- 2** The requirement is available through modification to the system. Cost of customization must be indicated, as well as, any **additional costs** to the County of Macomb in the Comments column and the Pricing Summary Worksheet as appropriate. If all costs for customization are not provided the response will be viewed as the requirement is not available.
- 1** The requirement currently is not available but is identified as a system enhancement. Indicate proposed availability date and any additional software/hardware modifications and associated costs required to implement the release. If availability date and all costs associated with this enhancement and additional customization are not provided the response will be viewed as the requirement is not available.
- 0** The requirement is not available.
- N/A** The requirement is not applicable.

***Deviation from the prescribed rating format established above will result in a 0 (zero) rating being assigned to the requirement.***





Number	Requirement	Reply	Comment
<b>1.0</b>	<b><i>Corporate Strategy</i></b>		
1.1	Bidder has an approved corporate strategic plan for future technical architecture and software development directions of the proposed solution, including but not limited to, timeframes for all known futures and necessary changes from current architecture needs.		
1.2	Bidder has strategic partnerships and / or alliances in place with other vendors that enhance the proposed solution(s).		
1.2.1	If yes, describe.		
1.3	Bidder, as a course of business, would enter into strategic partnerships or alliances with other vendors to enhance proposed solution(s).		
1.3.1	If yes, describe.		
1.4	The version of software you are proposing for the County of Macomb has been in use by the client community a minimum of 12 months.		
1.5	Formal quality assurance practices are followed to monitor post-live implementation performance issues.		

<b>2.0</b>	<b><i>Reporting Capabilities</i></b>		
2.1	Solution features ad-hoc reporting functionality.		
2.1.1	Application response times are not adversely affected by the running of ad-hoc reports.		
2.2	Solution features standard reports:		



Number	Requirement	Reply	Comment
2.2.1	Features report-filtering capabilities that allow users to select records to be included based upon user specified fields, (i.e., SSN, first name, last name, and date range).		
2.2.2	Features report sorting capability that allow users to specify sort order (i.e., by SSN, first-name, last-name, date range).		
2.3	Solution provides ability to store and re-print reports for a period of one (1) year.		
2.4	Periodic reports are created electronically for on-line analysis by user prior to printing/purging.		
2.5	Standard reports, ad hoc reports, and queries:		
2.5.1	Default to a printer, based upon user.		
2.5.2	Can be redirected by the user to a specific printer.		
2.5.3	Can be previewed before printing, including reports generated by the report writer.		
2.5.4	Can be scheduled to print at a later time.		
2.5.5	Can select and copy sections of reports and paste to other desktop software (i.e., MS Excel, MS Word, etc).		
2.6	Solution features a report writer.		
2.7	Solution interfaces with standard report writing products:		
2.7.1	Crystal Reports		
2.7.2	Other, (specify)		
2.8	Reports generated from report writer can be published to the network or saved in the user's directory.		
2.9	System provides user-defined templates for creating forms and letters and other documents.		
2.10	Able to generate reports from remote internet connection.		



Number	Requirement	Reply	Comment
<b>3.0</b>	<b><i>End-User Training</i></b>		
3.1	Bidder will provide on-site system training.		
3.2	Bidder will provide end-user training for up to 125 individuals:		
3.2.1	Application.		
3.2.2	Report writer software.		
3.2.3	All utilities.		
3.2.4	Training materials and documentation.		
3.2.5	Other, please describe.		
3.3	Bidder has completed a successful training process used at a governmental location similar to the County of Macomb that required customized training to reflect process improvements.		
3.3.1	If so, describe.		
3.4	Bidder will provide a training plan that will describe in detail how end user staff will be trained to use the system. The plan includes:		
3.4.1	A training strategy.		
3.4.1.1	Please provide a copy of your training strategy.		
3.4.2	Training environment including necessary hardware and peripherals (i.e. projector/screen, printer, etc.).		
3.4.2.1	Please provide a copy of the description of the training environment.		
3.4.3	Training methods to be used.		
3.4.3.1	Please provide a description of the training methods to be used.		
3.4.4	Training location and schedule.		



Number	Requirement	Reply	Comment
3.4.4.1	Please provide the training location and proposed schedule.		
3.4.5	List of instructors with qualifications.		
3.4.5.1	Please provide the list of instructors with qualifications.		
3.5	Bidder will execute the training services identified in the plan.		
3.6	Bidder's proposal describes the training that will be provided to end user staff. This will include:		
3.6.1	Curriculum.		
3.6.2	Training materials.		
3.6.3	Maximum number of students per class.		
3.6.4	Numbers of days required to cover course material.		

<b>4.0</b>	<b><i>Project Management</i></b>		
4.1	Bidder utilizes standard procedures for addressing project changes at all levels within the project (including customer sign-off).		
4.2	Bidder provides detailed project schedules and status reporting.		
4.3	Bidder utilizes templates for outlining deliverable schedules including milestone sign-offs.		
4.4	Bidder provides single point of contact for all project management tasks as well as escalation procedures.		
4.5	Bidder utilizes a formal process to initiate, track and implement project change requests.		
4.5.1	If so, describe the process used.		
4.6	Bidder utilizes a formal process to identify and report on all successes and failures within a project.		
4.6.1	If so, describe the process used.		



Number	Requirement	Reply	Comment
4.7	Bidder utilizes a formal process to correct problems that were a result of inadequate project/development control.		
4.7.1	If so, describe the process used.		
4.8	Bidder utilizes a formal process to obtain final sign-off from the customer management to formally close a milestone deliverable and the project overall.		
4.8.1	If so, describe the process used.		
<b>5.0</b>	<b><i>Application Requirements</i></b>		
5.1	Application must comply with Document Management Association standards and adhere to DMA 1.0 Tech specifications.		
5.2	Application must conform to industry-specific standards.		
5.3	Scanners must support the following types of documents:		
5.3.1	Double-sided.		
5.3.2	Various sizes of stock from 3X5 to 8.5X14.		
5.3.3	Various weights of stock.		
5.3.4	Various colors of stock.		
5.3.5	Pencil.		
5.3.6	Multiple colors of pen.		
5.3.7	Photos.		
5.3.7.1	Color.		
5.3.7.2	Black and white.		
5.4	System must provide for batch separators.		
5.5	Application must provide system-generated "date scanned".		
5.6	Application must provide support for database of choice.		
5.7	Application must provide ability to support different media formats (e.g. magnetic, DVD, CD, tape, etc.).		



Number	Requirement	Reply	Comment
5.8	Application must provide search capabilities.		
5.8.1	Optical Character Recognition.		
5.8.2	Full text search.		
5.8.3	Keyword search.		
5.9	Application must provide ability to create/delete/apply a digital signature.		
5.10	Application must provide ability to accept and manage documents and images submitted from scanners, fax, digital cameras and computer-generated data (i.e. word processing documents, spreadsheets, graphics, GIS maps, COLD, etc.		
5.11	Application must provide ability to route imaged data (workflow).		
5.12	Application must provide workflow services and allow for individual in-baskets for upwards of 150 employees.		
5.13	Solution provides capability for individual queue capacity in in-basket.		
5.13.1	Define queue capacity for individual in – basket?		
5.14	Workflow software must allow automatic and manual overrides and reassignments of items in work queues.		
5.14.1	Ability to start and stop running flows.		
5.14.2	Ability to put new process flows into production.		
5.14.3	Ability to allow for shared work queues.		
5.15	Ability to allow for workload balancing (intelligent work distribution).		
5.16	System must have ability to interface with the State of Michigan Child Support Enforcement System as outlined in the Current Environment portion of Section 1 of this document.		
5.17	Must allow for automatic updating of Court Notes in MICSES System.		



Number	Requirement	Reply	Comment
5.18	Must allow for automatic updating of Court Notes in MICSES System.		
5.19	Must allow for automatic updating of Docket Information in MICSES System.		
5.20	Ability to automatically capture images of Court Orders as they are produced without printing/scanning the physical document.		
5.21	Ability to cross-reference or link documents to one another.		
5.22	Ability to zoom in on a particular area of an image.		
5.23	Flexibility in defining the index definitions that will be used.		
5.24	Ability to logically store documents in folders or other hierarchy.		
5.25	Application must interface with GroupWise System.		
5.26	Application must interface with Michigan Child Support Enforcement System (MICSES).		
<b>6.0</b>	<b><i>Imaging Performance</i></b>		
6.1	Allow no degradation in image quality due to the use of highlighters or special color paper including carbon-less copies from original documents.		
6.2	Ability to automatically image varying page sizes up to legal size and varying paper mediums.		
6.3	Allow for automatic page enhancements, despeck, deskew and border cropping.		
6.4	Ability to manually and electronically group or route unacceptable images for rescanning.		



Number	Requirement	Reply	Comment
6.5	Ability to receive document images into the repository through various methods (i.e. batch scanning, ad hoc scanning and import from fax servers or file servers)		
6.6	Ability to index images on an unlimited number of separate, unique keys		





# **ATTACHMENT A**

## **Annual Document Quotas**

Average number of pages per existing FOC file: 325 pages

Average number of pieces of mail received:

Monthly:	20,000
Quarterly:	60,000
Annually:	240,000

Each piece of mail averages 2.5 pages



# **ATTACHMENT B**

## **Pricing Summary Worksheet**

The actual worksheet is on the following pages.

Attach appropriate schedule(s) which support the costs shown in each line item and label accordingly.

Cost out any additional system software or hardware products, utilities, etc. to efficiently operate the system which are not required but are recommended. These should be identified under the items as described as "other."



## Pricing Summary Worksheet

Line Item	Quantity	Description	Unit Cost	Extended Cost
A		Annual Subscription Service Fees		
B		Application Software		
C		Database software		
D		Communications Software		
E		Desktop Software		
F		Other Software (List/Describe)		
G		<b>Software Subtotal</b>		
<b>NOTE:</b> Provide Subscription Costs and software line item pricing on Pricing Summary Worksheet Schedule A				
H		Server hardware		
I		Network Hardware		
J		Uninterrupted Power Supply(UPS)		
K		Other Hardware (List/Describe)		
L		<b>Hardware Subtotal</b>		
<b>NOTE:</b> Provide hardware line item pricing on Pricing Summary Worksheet Schedule B				
M		Implementation Cost		
N		Conversion Cost		
O		Training Costs		
P		Customization Costs		
Q		Installation Cost		
R		Professional Services Cost (List/Describe)		
S		Other Service Costs (List/Describe)		
T		<b>Services Subtotal</b>		
<b>NOTE:</b> Provide services line item pricing on Pricing Summary Worksheet Schedule C				
U		Travel		
<b>NOTE:</b> Provide travel line item pricing on Pricing Summary Worksheet Schedule D				
V		<b>SYSTEM TOTAL</b>		
W		Annual Maintenance Cost		
X		Annual Support Cost		
Y		Annual Software Cost		
Z		<b>ON-GOING COSTS</b>		
aa		<b>Performance Bond</b>		



## Pricing Summary Worksheet Schedule A – Subscription Service Fees and Software

Line Item	Qty	Description	Types of Resources	Number of Units	Unit Cost	Extended Cost
A						
B						
C						
D						
E						
F						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
P						
Q						
R						
S						
T						
U						
V						
W						
X						



## Pricing Summary Worksheet Schedule B – Hardware

Line Item	Qty	Description	Types of Resources	Number of Units	Unit Cost	Extended Cost
A						
B						
C						
D						
E						
F						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
P						
Q						
R						
S						
T						
U						
V						
W						
X						



## Pricing Summary Worksheet Schedule C – Services

Line Item	Qty	Description	Types of Resources	Number of Units	Unit Cost	Extended Cost
A						
B						
C						
D						
E						
F						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
P						
Q						
R						
S						
T						
U						
V						
W						
X						



## Pricing Summary Worksheet Schedule D– Travel

Line Item	Nbr of Trips	Purpose of Trip	Airfare	Ground Transportation	Lodging	Meals	Total Cost of Trip
A							
B							
C							
D							
E							
F							
F							
G							
H							
I							
J							
K							
L							
M							
N							
O							
P							
Q							
R							
S							
T							
U							
V							
W							
X							



## Attachment C

### Bidder Compliance Worksheet

***IMPORTANT NOTE: Bidder by submitting this bid agrees that bidder understands the stated paragraphs and agrees to comply in full.***

Bidder shall mark the "Exception" column for each paragraph item that the bidder does not agree to comply in full. "Exceptions" to the stated requirements must be fully explained in an Appendix to the Bidder's response to the RFP with each paragraph item identified by number and description.

Paragraph	Description	Exception
	<b>Section 2 – Instructions</b>	
<b>2.1</b>	Definitions	
<b>2.2</b>	Proposal Submission	
<b>2.3</b>	Response due date	
<b>2.4</b>	Quantity of RFP responses	
<b>2.5</b>	Adherence to bid presentation requirements	
<b>2.6</b>	Original authorizing signature for response	
<b>2.7</b>	Bid response cost acceptance	
<b>2.8</b>	Bidder Meeting/Walkthrough	
<b>2.9</b>	Bid Opening	
<b>2.10</b>	Adherence to bid addressing requirements	
<b>2.11</b>	Final Award/Contract	
<b>2.12</b>	Contract Award Basis	
<b>2.13</b>	Right of Refusal	
<b>2.14</b>	Alternate Proposals	
<b>2.15</b>	Questions	
<b>2.16</b>	Response Format	
<b>2.17</b>	Offer Period	
<b>2.18</b>	Publication	
<b>2.19</b>	Delivery and Acceptance	
<b>2.20</b>	Equipment Age	
<b>2.21</b>	Performance Bond	





	<b>Section 3 – Terms and Conditions</b>	
<b>3.1</b>	Compliance with Laws	
<b>3.2</b>	Product Return	
<b>3.3</b>	Product Substitution	
<b>3.4</b>	Liability of Materials	
<b>3.5</b>	Acceptance	
<b>3.6</b>	Macomb County Employment Status	
<b>3.7</b>	Notice of Labor Disputes	
<b>3.8</b>	Advisement of Delays	
<b>3.9</b>	Licensure	
<b>3.10</b>	Insurance Requirements for Independent Contractors	
<b>3.11</b>	Indemnity	
<b>3.12</b>	Governmental Immunity	
<b>3.13</b>	Warranty	
<b>3.14</b>	Performance Warranty	
<b>3.15</b>	Trademarks	
<b>3.16</b>	Intellectual Property Warranty	
<b>3.17</b>	Intellectual Property Indemnity	
<b>3.18</b>	Contract Provision Enforceability	
<b>3.19</b>	Termination	
<b>3.20</b>	Assignment	
<b>3.21</b>	Trademarks	
<b>3.22</b>	Escrow of Software Source Code	
<b>3.23</b>	Payment Terms	
<b>3.24</b>	Taxes	
<b>3.25</b>	Controlling Laws	